

# Suggest New Vendor in e-Procurement 8.9

## *Overview*








This Job Aid shows the step-by-step processes for using Suggest New Vendor while creating a Requisition in eProcurement.

## *Purpose*

Suggest New Vendor is used while creating a Requisition only when the desired vendor does not already exist within OMNI's Vendor File. This option allows Requisitions to be created and the Vendor File to be updated with new information simultaneously using "Suggest" as the selected Vendor. This signals Purchasing to confirm and enter the Vendor information and update that information on the Requisition once the new Vendor is ready to be used.

## *New Icons*

Some icons have changed within the upgrade. Please be aware of these new icons and their related links.

-  Expand Section
-  Look up Glass
-  Comments
-  Comment field with previously existing comments.
-  Ship To Address
-  Spell Check
-  Line Details

## *Procedure*

This procedure is very closely related to the "Entering a Requisition in e-Procurement" Job Aid on the Purchasing website ([www.purchasing.fsu.edu](http://www.purchasing.fsu.edu)), and incorporates the method to Suggest New Vendor alongside the regular creation of a Requisition in e-Procurement.



## Navigation

eProcurement > Create Requisition

### Step 1 Define Requisition

The Create Requisition page requires defaults to be sent before adding lines/items on the Define Requisition tab.

Click: Vendor Lookup Eyeglass

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

**Business Unit:** FSU01 Florida State University

**\*Requester:** KSHEARER Shearer, Kelley

**Requisition Name:** Suggest Vendor in eProcurement

**\*Currency:** USD

**Priority:** Medium

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.  
Total Lines: 0  
Total Amount (USD): 0

**Line Defaults**  
Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
**Vendor:** [ ] **Vendor Location:** [ ]  
**Category:** [ ] **Unit of Measure:** [ ]

**Shipping Defaults**  
**Ship To:** SMMB149 **Due Date:** [ ] **Attention:** [ ]

**Accounting Defaults**  
Chartfields1 | Details | Asset Information

| Location | GL Unit | Dept | Fund | PC Bus Unit | Project | Activity | Source Type | Category | Subcate |
|----------|---------|------|------|-------------|---------|----------|-------------|----------|---------|
| SUCA14   | FSU01   |      |      |             |         |          |             |          |         |

Continue



## Step 2

Vendor Search page enables searches for Vendors using multiple parameters.

\*Be sure the Vendor you will suggest does not already exist within the database. The naming convention for vendor short name is the first five letters of the first name and then the first five letters of the second name.

Input:

Vendor ID: **Suggest**

Click: **Find**

**Vendor Search**

Vendor ID:

Name:

Short Vendor Name:

City:

Country:   State:

Postal Code:

[Return to Define Requisition](#)

Enter search criteria to find a vendor.

## Step 3

Click: **Suggest** link

**Vendor Search**

Vendor ID:

Name:

Short Vendor Name:

City:

Country:   State:

Postal Code:

[Return to Define Requisition](#)

| Vendor ID                 | Name    | Location | Address                | City        | State |
|---------------------------|---------|----------|------------------------|-------------|-------|
| 1 <a href="#">SUGGEST</a> | SUGGEST | MAIN     | 1400 UNIVERSITY CENTER | TALLAHASSEE | FL    |

Customize | Find | View All | First 1 of 1 Last



## Step 4

"SUGGEST" now appears as the Vendor.

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: FSU01 Florida State University  
\*Requester: KSHEARER Shearer, Kelley \*Currency: USD  
Requisition Name: Suggest Vendor in eProcurement Priority: Medium

Line Defaults  
Vendor: SUGGEST Vendor Location: 001  
Category: Unit of Measure:

Shipping Defaults  
Ship To: SMMB149 Modify Shipping Address  
Due Date: Attention:

Accounting Defaults  
Chartfields1 Details Asset Information

| Location | GL Unit | Dept | Fund | PC Bus Unit | Project | Activity | Source Type | Category | Subcategory |
|----------|---------|------|------|-------------|---------|----------|-------------|----------|-------------|
| SUCA14   | FSU01   |      |      |             |         |          |             |          |             |

Continue

Input:

Requisition Name: \*Optional

Category:

UOM:

Due Date:

Attention: \*Optional

Dept:

Fund:

*\*Only enter the following when using a Project!*

PC Bus Unit: FSU01

Project: <Your Project Number>

Activity: 1

Click: **Continue**

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: FSU01 Florida State University  
\*Requester: KSHEARER Shearer, Kelley \*Currency: USD  
Requisition Name: Suggesting a Vendor in ePro Priority: Medium

Line Defaults  
Vendor: SUGGEST Vendor Location: 001  
Category: 10100000 Unit of Measure: EA

Shipping Defaults  
Ship To: SMMB149 Modify Shipping Address

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Templates Special Request

Select a Request Type

|                       |   |
|-----------------------|---|
| <b>Special Item</b>   | Request an item that is not listed in the Catalog.                                  |
| Fixed Cost Service    | Request a one-time service for a flat fee.  |
| Variable Cost Service | Request a service for which the fee is based on the time worked.                    |
| Time and Materials    | Request a service for which the fee is based on the time worked and materials used. |

## Step 5



Job Aid: <Suggest a Vendor>

For Goods—  
Click: **Special Item** link

For Services—  
Click **Fixed Cost Service** link or **Variable Cost Service** link

### Step 6

Click: **Suggest New Vendor** link

The screenshot displays the 'Create Requisition' web application interface. At the top, there are three tabs: '1. Define Requisition', '2. Add Items and Services' (which is highlighted in yellow), and '3. Review'. Below the tabs, there is a search bar and a 'Special Request' template selected. The main form is titled 'Special Item' and contains the following fields:

- \*Item Description: [Text input field]
- \*Price: [Text input field]
- \*Quantity: [Text input field]
- \*Category: [Text input field with value '10100000' and a search icon]
- \*Currency: [Text input field with value 'USD']
- \*Unit of Measure: [Text input field with value 'EA' and a search icon]
- Vendor ID: [Text input field with value 'SUGGEST' and a search icon]
- Due Date: [Text input field with value '10/30/2006' and a calendar icon]
- Vendor Item ID: [Text input field]
- Mfg ID: [Text input field with a search icon]
- Mfg Item ID: [Text input field]

Below the main form is an 'Additional Information' section with a large text area and a search icon. At the bottom of the form, there are three checkboxes: 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher'. At the very bottom, there are three buttons: 'Add Item', 'Cancel', and 'Add and Start New Type'.



## Step 7

Enter new vendor information.

Input:

Vendor Name:

Contact Name: \*Optional

Country:

Address 1:

Address 2: \*Optional

Email/Web: \*Optional

City:

State:

Postal:

Phone Type:

Int'l Prefix:

Telephone:

Ext:

Fax #: \*Optional

Tin #:

MBE Code: Review link for [F](#)

Click: **Suggest Vendor** button

## Suggest a Vendor

Vendor Name: Office Miracles

Contact Name: Jacklyn Jones

### Address Information

Country: USA United States

Address 1: 236 Floures Lane

Address 2:

Email / Web:

City: Tampa

State: FL Florida

Postal: 32331

### Phone Information

Phone Type: Business Int'l Prefix: 850

Telephone: 443-7277 Ext: 111

Fax #: 850-443-4806

526667894

Tin # JOB

MBE Code

## Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Templates Special Request

### Special Item

\*Item Description:

\*Price: \*Currency: USD

\*Quantity: \*Unit of Measure: EA

\*Category: 10100000 Due Date:

Vendor ID: 0000000095 MDC VACUUM PRODUCTS Suggest New Vendor

Vendor Item ID:

Mfg ID:

Mfg Item ID:

### Additional Information

Send to Vendor  Show at Receipt  Show at Voucher

Add Item Cancel Add and Start New Type

### Requisition Summary

| Description                   | Qty      | UOM |
|-------------------------------|----------|-----|
| Item # KS71085, 60" Plasma... | 1        | EA  |
| Item # AA78221, Projector     | 1        | EA  |
| Total Lines:                  | 2        |     |
| Total Amount (USD):           | 1,700.00 |     |

## Step 3

Add Items and Services page



Job Aid: <Suggest a

Input:  
Item Description:  
Price:  
Quantity:  
Additional Information:  
\*Comments optional

Click: **Add Item**

*\*When Add Item is clicked, this page will re-display blank to allow additional lines to be added.*

For each additional line you

Must click [Suggest New Vendor](#)

Input:

Vendor Name: **see line 1**

Click: **Suggest Vendor**

**Notes:** To create a multi-line Requisition continue to enter the above inputs and click **Add Item** until all lines needed have been added.

The **Requisition Summary** box on the left-hand side of the screen will keep track of lines as they are added for quick and easy reference.



## Step 4

Review and Submit page is used to review line information and submit a Requisition to workflow.

Click the **expand** icon to view more details for each line.

Click: **Save & Submit** button to submit to workflow

OR

Click: **Save & Preview Approvals** button to save the Requisition without submitting it to workflow yet.

Note: When you click Save and Preview you may view the Approvers by clicking on the link but to save and submit you must then view printable version and then close it and your Save and Submit button will become accessible again.

### Create Requisition

1. Define Requisition    2. Add Items and Services    3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

**Business Unit:** FSU01 Florida State University  
**\*Requester:** KSHEARER Shearer, Kelley  
**\*Currency:** USD  
**Requisition Name:** Entering a Requisition in EPro  
**Priority:** Medium

#### Requisition Lines

| Line | Description   | Vendor Name         | Quantity | UOM  | Price     | Total    |
|------|---|---------------------|----------|------|-----------|----------|
| 1    | <a href="#">Item # KS71085_60" Plasma Flatscreen TV</a> | MDC VACUUM PRODUCTS | 1.0000   | Each | 1,200.000 | 1,200.00 |

Consolidate with other Reqs     Override Suggested Vendor

**Shipping Line:** 1    **Due Date:** [ ]    **Quantity:** 1.0000  
**Status:** Active    **\*Ship To:** SMMB149    [Modify Shipping Address](#)  
**Attention:** Shearer, Kelley

**\*Distribute by:** Qty    **SpeedChart:** [ ]

#### Accounting Lines

| Line | Status | Dist Type | *Location | Quantity | Percent  | Amount   | GL Unit | Entry Event | Dept   | Fund | PC Bus Unit |
|------|--------|-----------|-----------|----------|----------|----------|---------|-------------|--------|------|-------------|
| 1    | Open   |           | SUCA14    | 1.0000   | 100.0000 | 1,200.00 | FSU01   |             | 227000 | 110  |             |

Select All / Deselect All    **Total Amount:** 1,700.00 USD

[Add to favorites](#)    [Modify Line / Shipping / Accounting](#)    [Delete](#)

#### Justification/Comments

[Check Budget](#)

Save as Template

[Save & submit](#)    [Save & preview approvals](#)    [Cancel requisition](#)    [Find more items](#)



*Tip:* Use the **Line Details** icon to see additional and different information of a selected line.

### ***How to Code a Help Ticket***

For additional questions concerning the use of Suggest a Vendor on a Requisition, please log a Help Ticket (in Parature).

To log a Help Ticket, go to [us.fsu.edu/help](http://us.fsu.edu/help)  
Click **Submit a Ticket** link  
Sign-in with your **FSU ID & Password**

Input the following for questions concerning this Job Aid or other related issues:

Issue Area: **Purchasing**  
Issue Type: **Requisition**  
Summary: **Suggest a Vendor**

